

Retirement Services • Investments

My Account User Guide Fund to Fund Transfers

After you log in, you will see one of these two pages:

If you have more than one plan, you will see the Plan Overview page, as shown in the screen capture below. Click **View Plan Details**, then select your 401(k) Plan. **If you have only one plan**, you can access the "Manage My Plan" features, including Fund to Fund Transfers, from here.

	rivestments			Financial Group				
			Logout	Home			3	Lo
				XYZ Company 401(k) Plan	Home > Overview - XYZ Company 401(k) Pla	in		
Plan Overview				Investments	Overview			
Select View Plan Details	ior more information			Plan Balance	XYZ Company 401(k) Plan - 401(k) Pl	lan		
Total Balance: \$46	,341.65			Manage My Allocations Personal Bate of Return	Test Deleses	March 4 Bull		As of 11/2
				Adivity Summary	local Basance	Wisted Bala	Inca	
Plans & Individual Cor	itracts		Balance	Share Prices	\$41,50	0.64	\$41,500 ^{.64}	
401(k) Thrift	XYZ Company - 40	11(k) Plan	\$41,500.64	Charge My Contributions	Total Bala	ance	Vested Balance)
Individual Retirement Ar	nulty Ira - Direct Participa	ation Acc ount	\$4,841.01	Loans, Withdrawals and	View Detail	its	View Details	
Total Account Balance			\$46,341.65	Loans				
Mour Plan Datella	7			Withdrawals and Rollovers	Contributions			
View Plan Details	•			Transactions	Traditional: 1%	Roth: Start Contributing		
Plans & Individual Con	tracts		Balance	Pending Transactions Previous Transactions	Per Pay Period	Trout. Start Contributing		
Individual Retirement Ar	nnuity Ira - Direct Particip;	ation Account (777-777-B)	Converted*	eDocuments	You may make Traditional, Roth, or After-T Contributions.	fax Contributions to this plan, as indicated in this section. T	To begin, select either Start Contributing	or Manage My
401(k) Thrift	XYZ Company - 40	1(k) Plan	Converted*	Documents	Manage My Contributions			
Total Account Balance			\$0.00	Quarterly Statements	Summary			
				Investment Funds	Guinnary			
View Plan Details	1			Prospectuses and Other Important Documents	Source	Most Recent	YTD	Balance
				My Profile	Rollover	\$0.00 00/00/0000	\$0.00	\$41,500.64
Converted: If a plan is id Annuity Platform to our f	entified as "converted," then you will see t Mutual Fund Platform. Your account balan	two entries for the plan, one showing a zero balance, indic ce was not affected by the move.	ating it has been moved from our	View Profile Info View Beneficiaries	View Details			
				Log Out				
					Manage My Investments			
Mutual of Ame	rica				Automatic Rebalance	Change Future Allocations	Fund to Fund Tran	nsfers
Financial Group					AWAILABLE	AWALABLE	AMAILABLE	101010
•			Log Out					
an Select					Go To Manage My Investments			
an Select								
access your plan account infe	rmation, select a plan from among the ones listed by	abour.						
	Plan Type	Employer	Belance					
Plan Number	401(k) Plan	3YZ Company - 401(h) Plan	\$41,500.64					
Plan Number 010101								
Plan Number 010101 020202	Individual Retirement Annuity	Ira - Direct Participation Accou	\$4,841.01					

From the Plan Overview page, scroll to the bottom. Click **Fund to Fund Transfers**.

Automatic Rebalance	Change Future Allocations Available	Fund to Fund Transfers

Fund to Fund Transfers - Transfer From

Select the investment options where money will be drawn from, as well as the percentage or amount to be removed from those investment options for transfer.* Click the **Continue** button when selections have been made.

			Lo
KYZ Company 101(k) Plan	Home > Transfers - XYZ Company 401(k) Plan		
Investments	Transfers		
Plan Balance	XYZ Company 401(K) Plan - 401(K) Plan		
Manage My Allocations Personal Rate of Return			
Activity Summary	Step 1 Step 2 Step 3		
Share Prices	0		
Contributions	Request Verify Confirm		
Change My Contributions	Transfers – Overview		
Loans			
Loans	To make a transfer among your current fund balances, follo which only affects future, ongoing contributions.	w the steps below. A transfer affects only the current balances and	differs from an allocation change,
Transactions	If you make a transfer on the same day an automatic rebal	ance is scheduled to execute, then the transfer will cancel that autor	matic rebalance. However.
Pending Transactions	subsequent automatic rebalances will execute as schedule	d and may not take into account any intervening transfers you have	made.
eDocuments	Please read our Frequent Transfer Activity Policy before pro	oceeding with your transfer.	
Documents			
Forms	Transfer Options – Step 1: Transfer from		
Quarterly Statements	Select whether you want to make your transfer as a percen	tage of your total balance or a specific dollar amount.	
Investment Funds			
Prospectuses and Other Important Documents	Select: Percentage	Dollar Amount	
My Profile			
View Profile Info	Fund Name	Current Fund Balance	Transfe
View Beneficiaries			
Log Out	T. Rowe Price Spectrum Cnsrv Allc I	\$1,009.57	9
	T. Rowe Price Spectrum Moderate Allc I	\$979.38	9
	T. Rowe Price Spectrum Moderate Alic I Calvert International Responsible Idx R6	\$979.38 \$939.12	9
	T. Rove Price Spectrum Moderate Alic I Calvert International Responsible Idx R6 Mutual of America International Fund	\$979.38 \$939.12 \$882.67	s 9
	T. Rowe Price Spectrum Moderate Alic I Calvert International Responsible Idx R5 Mutual of America International Fund Vanguard International Growth Adm	\$979.38 \$939.12 \$882.67 \$838.25	9 9 9 20 9
	T. Rowe Price Spectrum Moderate Alic I Calvert International Responsible (dx R6 Mutual of America International Fund Vanguard International Growth Adm	5979-38 5939-12 5882.67 5838.25	s s s 20 s
	T. Rowe Price Spectrum Moderate Alic I Calvert International Responsible Idx R6 Mutual of America International Fund Vanguard International Growth Adm Calvert US Large Cap Core Rspnb Idx R6	\$979.38 \$939.12 \$882.67 \$838.25 \$972.21	9 9 20 9
	T. Rove Price Spectrum Moderale Alic I Calvert International Responsible Idx R5 Mutual of America International Fund Vanguard International Growth Adm Calvert US Large Cap Core Rsprb Idx R5 Dodge & Cox Stock:	\$979.38 \$939.12 \$882.67 \$838.25 \$972.21 \$1.071.72	9 9 9 20 9 9 9 9 9 9 9
	T. Rove Price Spectrum Moderale Alic I Calvert International Responsible (dx:R6 Mutual of America International Fund Vanguard International Growth Adm Calvert US Large Cap Core Rapho Idx:R6 Dodge & Cox Stock Harbor Capital Appreciation Retirement	\$979.38 \$939.12 \$882.67 \$838.25 \$972.21 \$1.071.72 \$816.85	9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9
	T. Rove Price Spectrum Moderate Alic I Calvert International Responsible Idx R6 Mutual of America International Fund Vanguard International Growth Adm Calvert US Large Cap Core Rspnb Idx R6 Dodge & Cox Stock: Harbor Capital Appreciation Refirement Mutual of America Equity Index Fund	\$979.38 \$939.12 \$882.67 \$838.25 \$972.21 \$1,071.72 \$816.85 \$991.39	9 9 9 20 9 9 9 9 9 9 9 9
	T. Rove Price Spectrum Moderate Alic I Calvert International Responsible Idx R6 Mutual of America International Fund Vanguard International Growth Adm Calvert US Large Cap Core Rsprb Idx R6 Dodge & Cox Stock Harbor Capital Appreciation Retirement Mutual of America Equity Index Fund Mutual of America 2055 Retirement Fund	\$979.38 \$939.12 \$882.67 \$838.25 \$972.21 \$1.071.72 \$816.85 \$981.39 \$947.12	9 20 9 0 9 0 9 0 9 0 9 0 9 0 9 0 9 0 9 0 9 0 9 0 9 0 9 0 9 0 9 0 10
	T. Rove Price Spectrum Moderate Alic I Calvert International Responsible Idx R6 Mutual of America International Fund Vanguard International Growth Adm Calvert US Large Cap Core Rspnb Idx R6 Dodge & Cox Stock: Harbor Capital Appreciation Refirement Mutual of America 2055 Refirement Fund Mutual of America 2055 Refirement Fund	\$979.38 \$939.12 \$8882.67 \$838.25 \$972.21 \$1,071.72 \$816.85 \$991.39 \$947.12 \$952.64	
	T. Rove Price Spectrum Moderale Alic I Calvert International Responsible 10x R6 Mutual of America International Fund Vanguard International Growth Adm Calvert US Large Cap Core Rspnb Idx R6 Dodge & Cox Stock Harbor Capital Appreciation Retirement Mutual of America Equity Index Fund Mutual of America 2050 Retirement Fund Mutual of America 2050 Retirement Fund	\$979.38 \$939.12 \$882.67 \$838.25 \$972.21 \$1.071.72 \$816.85 \$981.39 \$991.39 \$947.12 \$952.64 \$971.40	

Fund to Fund Transfers - Transfer To

Choose where the transferred money will go, as well as what dollar amount or percentage the selections will receive.*

Scroll up if you need to review your choices in the "From" step.

Note: The Continue button will not be enabled until the investment options that receive an increase total 100%.

Retirement Services - Investm	ents		
ne			Log C
	Transfer Options – Step 2: Transfer to		
	Enter the percentage you wish to transfer from your current in same fund from which you are transferring. Transfers are subject to Mutual of America's frequent transfer prospectuses of the underlying funds, which are available on	vestment balance(s). Enter only whole numbers. You are policy. For more information about the frequent transfer p this website or by calling us at 800.468.3785	not permitted to transfer an amount to the policies and procedures, please refer to the
	Fund Name	Current Fund Balance	Transfer Percentage
	Large US Equity		
	Calvert US Large Cap Core Rspnb Idx R6	\$972.21	96
	Dodge & Cox Stock	\$1,071.72	%
	Mutual of America Mid-Cap Equity Index F	\$1,023.08	%
	Small US Equity		
	Calvert Small-Cap R6	\$1,043.67	%
	Delaware Small Cap Value R6	\$1,067.10	75 %
	Mutual of America Small Cap Equity Index	\$1,020.37	%
	Victory RS Small Cap Growth R6	\$824.41	96
	Fixed Income		
	Calvert Bond R6	\$1,008.10	%
	PIMCO Real Return Insti	\$984.53	96
	Vanguard Total Bond Market Index Adm	\$1,001.44	%
	Money Market		
	Vanguard Treasury Money Market Investor	\$1,178.11	25 %
	Intl/Global Equity		
	American Funds New World R6	\$927.57	96
	Total Allocation must equal 100%	\$38,338.42	100%

*Subject to Mutual of America's Frequent Transfer Policy.

In the Verify step, you will see your investment choices as selected. At this point, you can return to the previous page to change your rebalancing options, or you can click the **Continue** button.

Note that the image below does not show the complete list of investment options available. Also, the investment selections shown in the image below are only for illustrative purposes.

Once your selections are made, click the **Continue** button.

lome					Log Out
(YZ Company 401(k) Plan	Home > Transfer	Verification - XYZ C	company 401(k) Plan		
	Transfors	Vorificati	on		
Investments	XYZ Compan	vernicati	- 401(k) Plan		
Plan Balance		.j			
Manage My Allocations					
Personal Rate of Return	Step 1	Step 2	Step 3		
Activity Summary	0-	_0			
Share Prices	Request	Vorify	Confirm		
Contributions	Nequest	Veniy	Commit		
Change My Contributions	Transfers Verif	fication			
Loans					
Loans	The following i which you are	nformation verifies transferring; and th	the selection you made. Review this carefi e transfer percentage, dollar amount, or n	ully, especially with respect to the fund(s) from w umber of shares. If you wish to make additional	hich you are transferring; the fund(s) to changes, select Cancel, and you will be
Transactions	required to beg	gin the Transfers pr	ocess again. If you select Back, you will be	e directed to the previous screen, where you can	re-enter your transfer selections.
Pending Transactions	_				
Previous Transactions					
oDocumento	Transfer From				
eDocuments	Transfer From				
Documents	Hanaler Flohr				
Documents Forms	Fund Name				Transfer Percentage
Documents Forms Quarterly Statements	Fund Name	tal Appreciation Ref	irement		Transfer Percentage
Documents Forms Quarterly Statements Investment Funds	Fund Name Harbor Capit	tal Appreciation Ret	irement		Transfer Percentage
Documents Forms Quarterly Statements Investment Funds Prospectuses and Other	Fund Name Harbor Capit	tal Appreciation Ret	irement Adm		Transfer Percentage 50% 20%
Documents Forms Quarterly Statements Investment Funds Prospectuses and Other Important Documents	Fund Name Harbor Capit	tal Appreciation Ret ternational Growth J	irement Adm		Transfer Percentage 50% 20%
Documents Forms Quarterly Statements Investment Funds Prospectuses and Other Important Documents My Profile	Fund Name Harbor Capil	tal Appreciation Rel	Irement Adm		Transfer Percentage 50% 20%
Documents Forms Cuarterly Statements Investment Funds Prospectuses and Other Important Documents My Profile View Profile Info	Fund Name Harbor Capil Vanguard Int	tal Appreciation Ref	irement Adm		Transfer Percentage 50% 20%
Documents Forms Cuarterly Statements Investment Funds Prospectuses and Other Important Documents My Profile View Profile Info View Beneficiaries	Fund Name Harbor Capil Vanguard Int	tal Appreciation Rel	irement Adm		Transfer Percentage 50% 20%
Documents Forms Couarterly Statements Investment Funds Prospectuses and Other Important Documents My Profile View Profile Info View Beneficiaries Log Out	Fund Name Harbor Capil Vanguard Int	tal Appreciation Rel	irement Adm		Transfer Percentage 50% 20% Transfer Percentage
Documents Forms Quarterly Statements Investment Funds Prospectuses and Other Important Documents My Profile View Profile Info View Beneficiaries Log Out	Fund Name Harbor Capil Vanguard Int Transfer To Fund Name Delaware Sp	tal Appreciation Ref ternational Growth / nall Cap Value R6	irement Adm		Transfer Percentage 50% 20% Transfer Percentage 75%
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In the Confirm step, you will see the same information that was displayed on the previous page. However, since your rebalancing preferences have been acknowledged, the page also contains a confirmation number for future reference.

Note that the investment image below does not show the complete list of investment options available. Also, the investment selections shown in the image below are only for illustrative purposes.

Retirement Services - Investments				
me				Log
Z Company 1(k) Plan	Home > Transfers	Confirmation - XYZ	Company 401(k) Plan	
Investments	Transfers	Confirma	ation	
Plan Balance	XYZ Company	y 401(k) Plan -	- 401(k) Plan	
Manage My Allocations				
Personal Rate of Return				
Activity Summary	Step 1	Step 2	Step 3	
Share Prices	0	-0-	— 0	
Contributions	Request	Verify	Confirm	
Change My Contributions	Transfers Confi	irmation		
Loans				
Loans	Your selections	have been submit	ted.	🕀 Prin
			951	
Transactions	Confirmation N	NO. 202211110225	331	
Transactions Pending Transactions	Confirmation N	NO. 202211110225		
Transactions Pending Transactions Previous Transactions	All valid request	ts received by the e	close of the New York Stock Exchange (usually, 4:00 p.m. ET) NYSE is closed, such as weekends and certain holidays. will) are processed that same day. Transactions submitted after the be processed the next business day. You can view your pending
Transactions Pending Transactions Previous Transactions sDocuments	All valid request close of the NY transactions by	ts received by the of SE or on days the selecting Pending	close of the New York Stock Exchange (usually, 4:00 p.m. ET) NYSE is closed, such as weekends and certain holidays, will I Transactions from the left-hand navigation menu.) are processed that same day. Transactions submitted after the be processed the next business day. You can view your pending
Transactions Pending Transactions Previous Transactions aDocuments Documents	All valid request close of the NY: transactions by	ts received by the of SE or on days the selecting Pending	close of the New York Stock Exchange (usually, 4:00 p.m. ET) NYSE is closed, such as weekends and certain holidays, will I Transactions from the left-hand navigation menu.) are processed that same day. Transactions submitted after the be processed the next business day. You can view your pending
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Transactions Pending Transactions Previous Transactions eDocuments Documents Forms Quarterly Statements Investment Funds	Confirmation N All valid request close of the NY: transactions by Transfer From	No. 2022111102251 ts received by the SE or on days the selecting Pending	close of the New York Stock Exchange (usually, 4:00 p.m. ET) NYSE is closed, such as weekends and certain holidays, will i Transactions from the left-hand navigation menu.) are processed that same day. Transactions submitted after the be processed the next business day. You can view your pending
Transactions Pending Transactions Previous Transactions sDocuments Documents Forms Quarterly Statements nvestment Funds Prospectuses and Other geochact Documents	Confirmation M All valid request close of the NY3 transactions by Transfer From Fund Name	No. 202211110225	close of the New York Stock Exchange (usually, 4:00 p.m. ET) NYSE is closed, such as weekends and certain holidays, will I Transactions from the left-hand navigation menu.) are processed that same day. Transactions submitted after the be processed the next business day. You can view your pending
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Transactions Pending Transactions Previous Transactions eDocuments Documents Forms Quarterly Statements nvestment Funds Prospectuses and Other mportant Documents Vy Profile View Profile Info	Confirmation M All valid request close of the NY: transactions by Transfer From Fund Name Harbor Capita Vanguard Inte	ts received by the SE or on days the selecting Pending al Appreciation Reti	close of the New York Stock Exchange (usually, 4:00 p.m. ET) NYSE is closed, such as weekends and certain holidays, will i Transactions from the left-hand navigation menu.) are processed that same day. Transactions submitted after the be processed the next business day. You can view your pending Transfer Percentage 50% 20%
Transactions Pending Transactions Previous Transactions eDocuments Documents Corms Quarterly Statements Prospectuses and Other mportant Documents Wy Profile View Profile Info View Beneficiaries	Confirmation M All valid request close of the NY3 transactions by Transfer From Fund Name Harbor Capita Vanguard Inte	ts received by the issues of the selecting Pending selecting Pending al Appreciation Reti	close of the New York Stock Exchange (usually, 4:00 p.m. ET) NYSE is closed, such as weekends and certain holidays, will i Transactions from the left-hand navigation menu.	are processed that same day. Transactions submitted after the be processed the next business day. You can view your pending Transfer Percentage 50%
Transactions Pending Transactions Previous Transactions aDocuments Documents Counterly Statements Investment Funds Prospectuses and Other mportant Documents My Profile View Profile Info View Beneficiaries Log Out	Confirmation M All valid request close of the NY3 transactions by Transfer From Fund Name Harbor Capita Vanguard Inte	NO. 2022111102251 ts received by the i SE or on days the selecting Pending al Appreciation Reti emational Growth A	close of the New York Stock Exchange (usually, 4:00 p.m. ET) NYSE is closed, such as weekends and certain holidays, will i Transactions from the left-hand navigation menu.	are processed that same day. Transactions submitted after the be processed the next business day. You can view your pending Transfer Percentage 50% 20%
Transactions Pending Transactions Previous Transactions Previous Transactions Providus Transactions Procuments Proms Quarterly Statements Prospectuses and Other Prospectuses and Other Prospectuses and Other Profile Prospectuses and Other Profile Prospectuses and Other Profile P	Confirmation M All valid request close of the NY3 transactions by Transfer From Harbor Capita Vanguard Inte	ts received by the i SE or on days the selecting Pending	close of the New York Stock Exchange (usually, 4:00 p.m. ET) NYSE is closed, such as weekends and certain holidays, will i Transactions from the left-hand navigation menu.	are processed that same day. Transactions submitted after the be processed the next business day. You can view your pending Transfer Percentage 50% 20%
Transactions Pending Transactions Previous Transactions aDocuments Documents Forms Quarterly Statements nvestment Funds Prospectuses and Other mportant Documents Vy Profile View Profile Info View Beneficiaries Log Out	Confirmation M All valid request close of the NY3 transactions by Transfer From Fund Name Harbor Capita Vanguard Inte Transfer To Fund Name	No. 2022111102251 ts received by the i SE or on days the selecting Pending al Appreciation Reti ernational Growth A	close of the New York Stock Exchange (usually, 4:00 p.m. ET) NYSE is closed, such as weekends and certain holidays, will i Transactions from the left-hand navigation menu.	are processed that same day. Transactions submitted after the be processed the next business day. You can view your pending Transfer Percentage 50% 20% Transfer Percentage
Transactions Pending Transactions Previous Transactions eDocuments Documents Counterly Statements Investment Funds Prospectuses and Other Important Documents My Profile View Profile Info View Beneficiaries Log Out	Confirmation M All valid request close of the NY3 transactions by Transfer From Fund Name Harbor Capita Vanguard Inte Transfer To Fund Name Delaware Sm	to received by the SE or on days the Selecting Pending al Appreciation Reti armational Growth A	close of the New York Stock Exchange (usually, 4:00 p.m. ET) NYSE is closed, such as weekends and certain holidays, will i Transactions from the left-hand navigation menu.	are processed that same day. Transactions submitted after the be processed the next business day. You can view your pending Transfer Percentage 50% 20% Transfer Percentage Transfer Percentage
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Immediately After Fund to Fund Transfer

You will be prevented from making another Fund to Fund Transfer until the first one has been acknowledged by the system.

If the request is made before 4:00 p.m. ET, it should be processed by the start of the next business day.

If the request is made after 4:00 p.m. ET, it should be processed by the start of the day after the next business day.

Manage My Investments		
Automatic Rebaland	Ce Change Future Allocations Fund to Fund Transfers AVAILABLE Image: Superserve S	\$
Go To Manage My Investmen	ica	
Retirement Services - Investments		Log O
YZ Company H 01(k) Plan	iome > Manage My Allocations - XYZ Company 401(k) Plan	
Investments X	Manage My Allocations KYZ Company 401(k) Plan - 401(k) Plan	
Manage My Allocations Personal Rate of Return	Automatic Rebalance Available	
Activity Summary Share Prices Contributions	The Automatic Rebalance feature transfers your account assets among the funds in your account based on a schedule you select so that your cu match your future allocations. You can elect to have your account automatically rebalanced Monthly, Quarterly, Semi-Annually, or Annually.	rrent allocations
Change My Contributions Loans, Withdrawals and Rollovers	to make a drange to your automatic reparance, sered continue.	
Loans Withdrawals and Rollovers	Continue	
Transactions Pending Transactions	Change My Future Allocations Available	
Previous Transactions eDocuments	When you make a change to your future allocations, only ongoing contributions are affected—to make changes to your current balances in any of funds, select Transfers below.	the investment
Forms	To make a change to your future allocations, select Continue.	
Investment Funds Prospectuses and Other	Continue	
Important Documents My Profile	Transfers Unavailable	
View Profile Info View Beneficiaries Log Out	A transfer affects only the current balances and differs from an allocation change, which only affects future, ongoing contributions. To make chang allocations, select Change My Future Allocations above. To make a transfer among your current fund balances, go to Pending Transactions and cancel any existing automatic rebalance, allocation chang scheduled for today. Then, go to the Transfers section, where you can enter your transfer selection(s), including the earlier transfer(s) you just can new transfer(s).	es to your future e(s), or transfer(s) toeled and any

Canceling the Transfer Request

If your request has not yet been processed, you can cancel the request by clicking the **Pending Transactions** link on the left side of the page. Clicking on the **Cancel** button will bring up a prompt that will ask you to confirm your cancellation. Clicking the **Yes** button in that prompt will remove the request from the transaction list.

lome				Log Ou		
YZ Company D1(k) Plan	Home > Pending Transactions - >	KYZ Company 401(k) Plan				
Investments Plan Balance	Pending Transactions XYZ Company 401(k) Plan - 401(k) Plan					
Manage My Allocations Personal Rate of Return Activity Summary	All valid requests received by th of the NYSE or on weekends ar been processed will not appear	he close of the New York Stock Exchange (nd holidays will be processed the next bus) in this Pending Transactions section.	usually, 4:00 p.m. ET) are processed th ness day. You cannot cancel or change	hat same day. Transaction submitted after the clos the request after that time. Transactions that hav		
Share Prices Contributions	Transaction	Date/Time (Central Time)	Confirmation #	Status		
Change My Contributions	Automatic Rebalance	01:19 PM CT 11/28/2022	2022112801191072	Pending Cancel		
Loans, Withdrawals and Rollovers						
Loans	You have requested the transac cancel a transaction, select Car	ctions above. You may cancel a transaction ncel.	at any time before the close of the New	w York Stock Exchange (usually, 4:00 p.m. ET). To		
Withdrawals and Rollovers Transactions	If you cancel an Allocation Char	nge, then any Automatic Rebalance selecti	on you made along with that same Allo	cation Change will also be canceled.		
Pending Transactions						
Previous Transactions						
eDocuments						

	est ×	ending Cancel Requ	Pe	Financial Group Retrement Services - Investments	
• Log 0				Home	
	you choose not to cancel this nding Transaction. You can the New York Stock	you sure you want to cancel this transaction? It saction now, the transaction will remain as a Pe cel a transaction at any time before the close of	Home > Pending Tra trans	XYZ Company 401(k) Plan	
		hange (usually, 4:00 p.m. ET).	Pending T	Investments	
			 XYZ Company 	Plan Balance	
at same day. Transaction submitted after the clo	No Yes sed th		All valid requests rec	Manage My Allocations	
the request after that time. Transactions that ha	lange	ear in this Pending Transactions section.	of the NYSE or on w been processed will not appe	Personal Rate of Return	
				Activity Summary	
				Share Prices	
Status	Confirmation #	Date/Time (Central Time)	Transaction		
Pending Cancel	2022112801191072	01:19 PM CT 11/28/2022	Automatic Rebalance	Change My Contributions	
				Loans, Withdrawals and Rollovers	
York Stock Exchange (usually, 4:00 p.m. ET).	at any time before the close of the New	nsactions above. You may cancel a transaction	You have requested the trans cancel a transaction select (Loans	
		oranioen.	cancer a nanaocion, select s	Withdrawals and Rollovers	
ation Change will also be canceled.	n you made along with that same Alloc	Change, then any Automatic Rebalance selectic	If you cancel an Allocation C	Transactions	
				Pending Transactions	
				Previous Transactions	
				eDocuments	
				Documents	

Canceling the Transfer Request (continued)

Home XYZ Company 401(k) Plan				
XYZ Company 401(k) Plan				Log Ou
	Home > Pending Transaction	is - XYZ Company 401(k) Plan	-	
Investments Plan Balance	Pending Trans	sactions () Plan - 401(k) Plan		
Manage My Allocations Personal Rate of Return Activity Summary	All valid requests received b of the NYSE or on weekend been processed will not app	by the close of the New York Stock Exchange is and holidays will be processed the next bus bear in this Pending Transactions section.	(usually, 4:00 p.m. ET) are processed t iness day. You cannot cancel or chang	hat same day. Transaction submitted after the close the request after that time. Transactions that have
Share Prices Contributions	Transaction	Date/Time (Central Time)	Confirmation #	Status
Change My Contributions	There are no pending	transactions available.		
Loans, Withdrawals and Rollovers Loans	You have requested the tran cancel a transaction, select	sactions above. You may cancel a transaction Cancel.	n at any time before the close of the Ne	w York Stock Exchange (usually, 4:00 p.m. ET). T
Withdrawals and Rollovers	If you cancel an Allocation C	Change, then any Automatic Rebalance select	ion you made along with that same Allo	ocation Change will also be canceled.
Transactions				
Pending Transactions				
Previous Transactions				
eDocuments				
Documents				



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